EDI 940 - Warehouse Shipping Order

Cavallo Support - 2025-06-12 - EDI

Overview

The EDI 940 Warehouse Shipping Order transaction is used to instruct remote warehouses to ship sales orders. It is commonly used by a seller, such as a manufacturer or wholesaler, to authorize a warehouse to ship to a buyer, such as a retailer. The 940 may also be used to confirm a shipment, modify a shipment, or cancel a previous shipping order. The 940 transaction instructs the warehouse on what to ship, how much, and when.

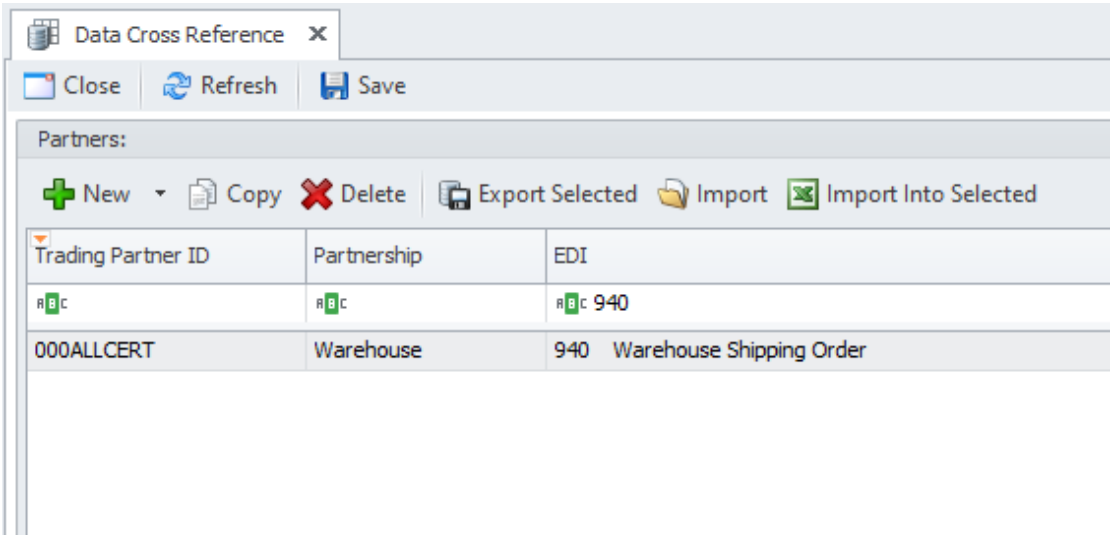
Prerequisites

Before continuing with the EDI 940 configuration, make sure EDI is properly configured in SalesPad by reviewing the following documentation:

- EDI Installation
- EDI Processing
- Data Cross Reference
- Business Object Mapping
- EDI Server Connection Setup
- EDI Trading Partner Setup Steps

Data Cross Reference

Select the EDI tab on the ribbon and open the Data Cross Reference screen.



Click the New button to add a new trading partner and set the following columns:

Column	Value
Trading Partner ID	Trading partner ID from the EDI order header, such as 000ALLCERT
Partnership	“Warehouse”
Customer Num	GP customer number (optional)
Warehouse	Sales document warehouse/location (optional)
EDI	940 Warehouse Shipping Order

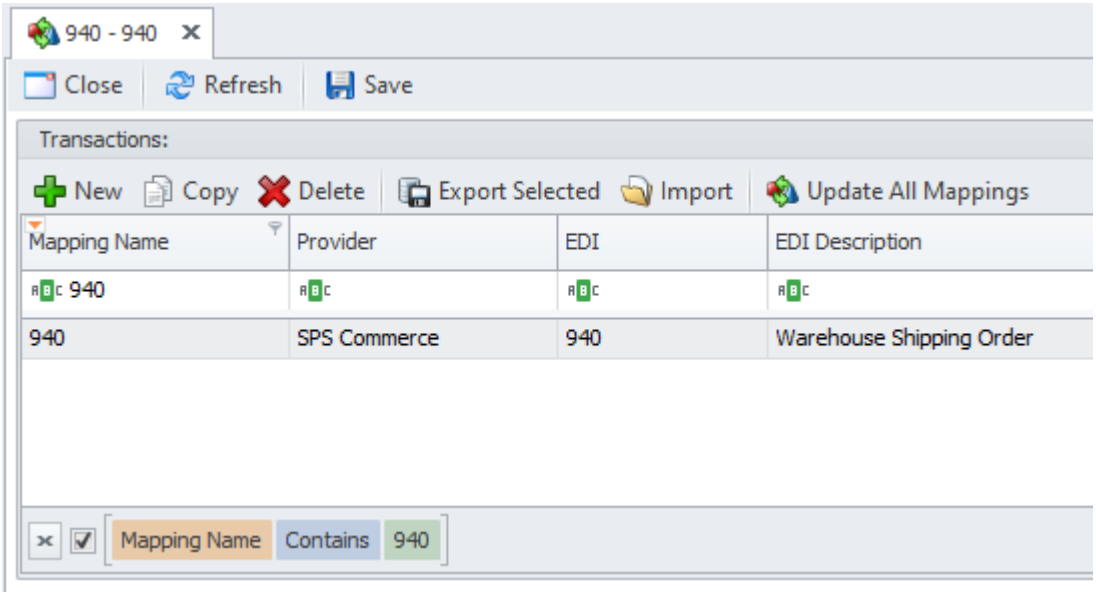
Make sure the new trading partner is selected and then fill out the following mapping tabs as needed:

- Addresses
- Items
- Units of measures
- Currencies
- Payment terms
- Shipping methods

Save all changes and close the Data Cross Reference screen.

Business Object Mapping

Select the EDI tab on the ribbon and open the Business Object Mapping screen.



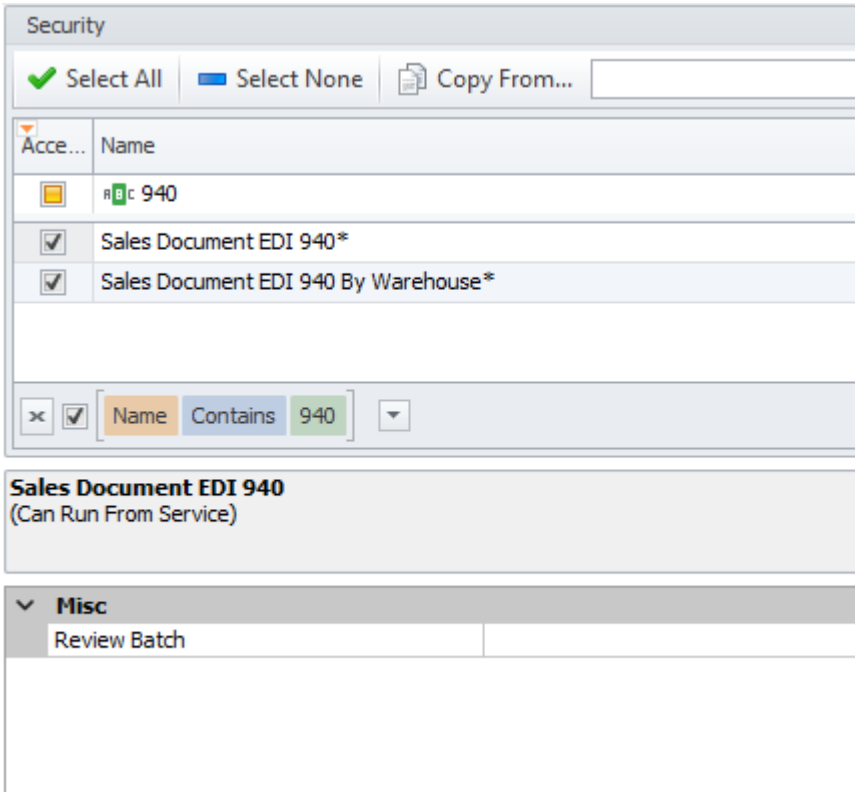
Click the New button to add a new transaction and set the following columns:

Column	Value
Mapping Name	Name of the 940 transaction mapping
Provider	SPS Commerce
EDI	940
Schema Name	StockTransferOrders
Direction	Out
Document Type	Sales Document
Document Subtype	Sales document type and ID in Dynamics GP, e.g. “ORDER WMSORDER”
Trading Partners	Trading partners to which the mapping applies (trading partners are configured on the Data Cross Reference screen)

Save all changes and close the Business Object Mapping screen.

Security Editor

Open the Security Editor by going to Modules -> System -> Security Editor and make sure the Sales Document EDI 940 and Sales Document EDI 940 By Warehouse plugins are enabled. Update sub-securities as needed. Save all changes, log out, and log back in for changes to take effect.

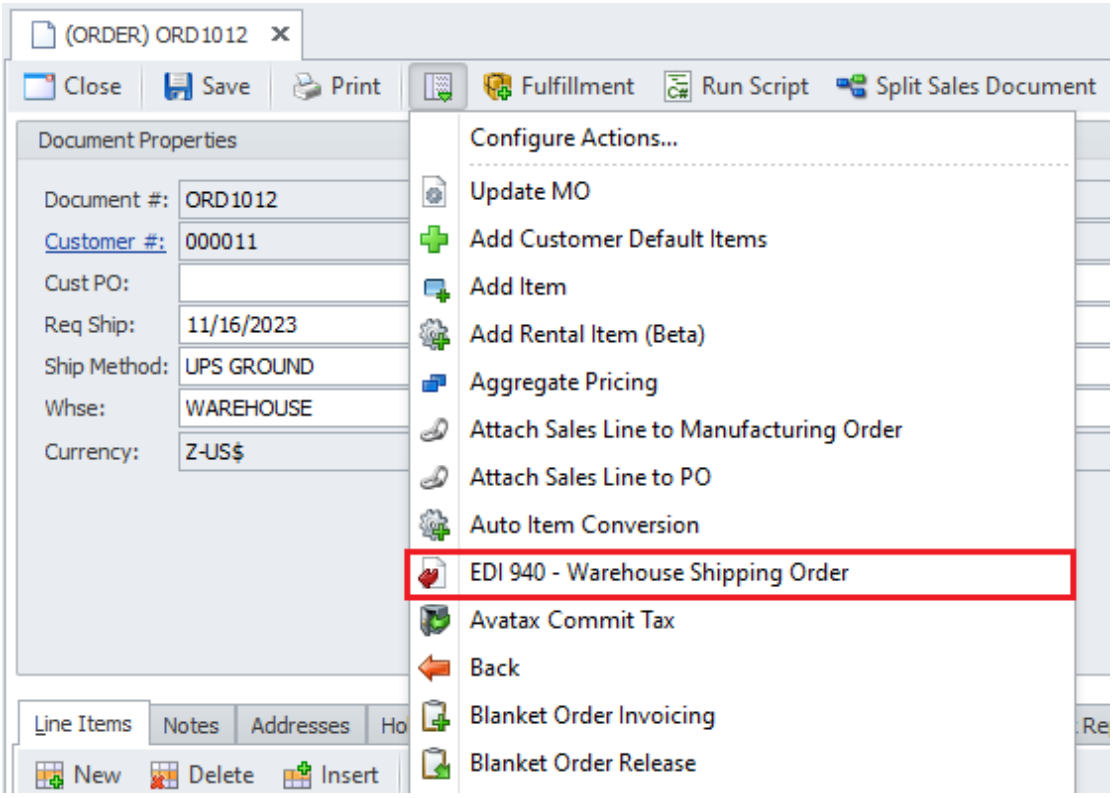


Review Batch - When forwarding through workflow, sales documents will be sent to this batch if the EDI transaction fails.

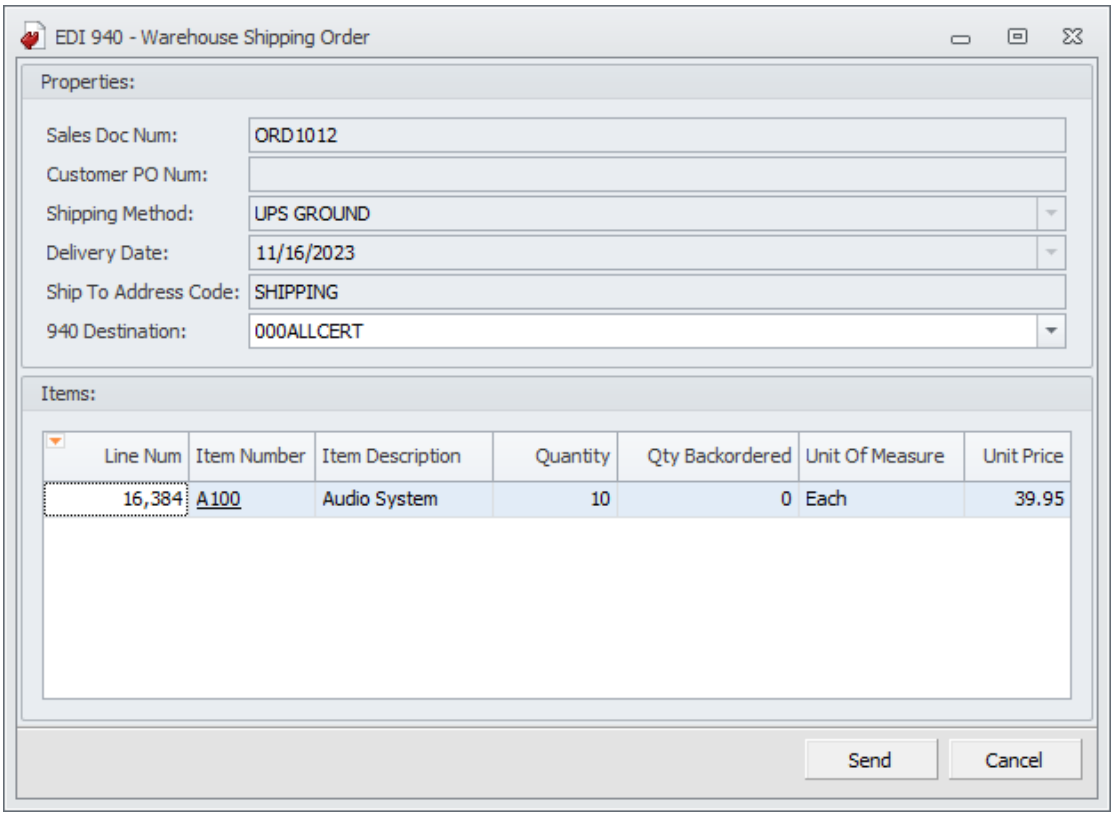
Sales Document Entry

Sales Document EDI 940

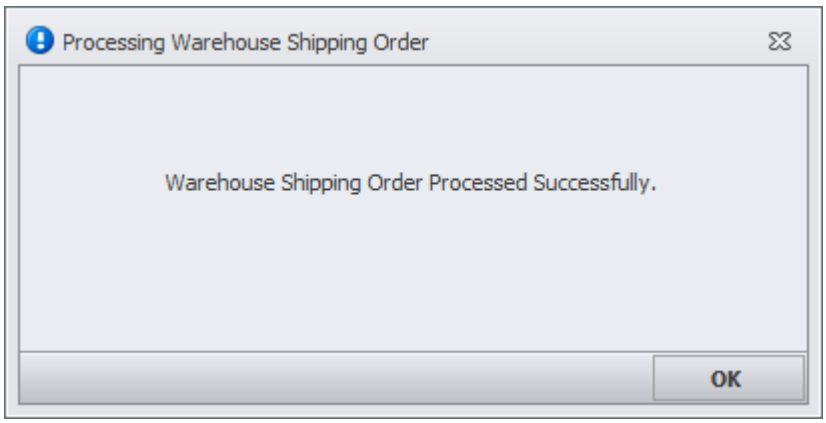
Open the sales document and select the EDI 940 - Warehouse Shipping Order plugin from the Actions menu to process an EDI 940 transaction.



The EDI 940 - Warehouse Shipping Order window will open, allowing review of the EDI 940 transaction details before generating and sending the EDI document.

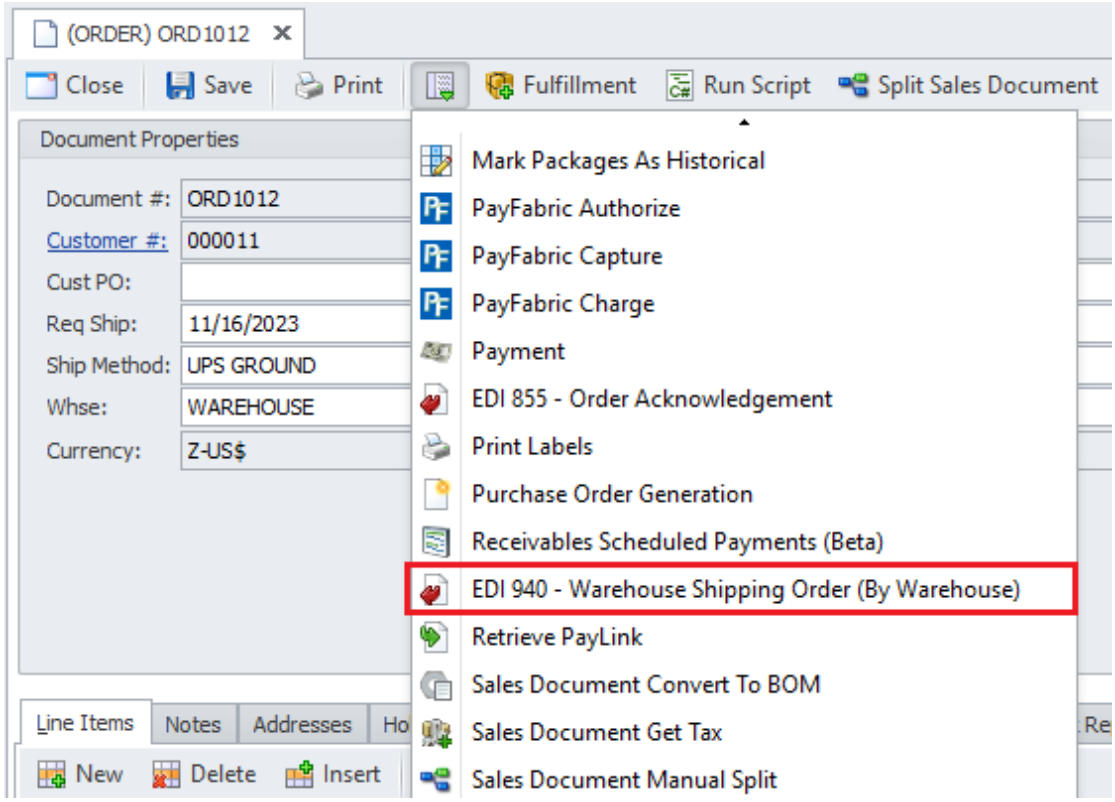


Select the 940 Destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

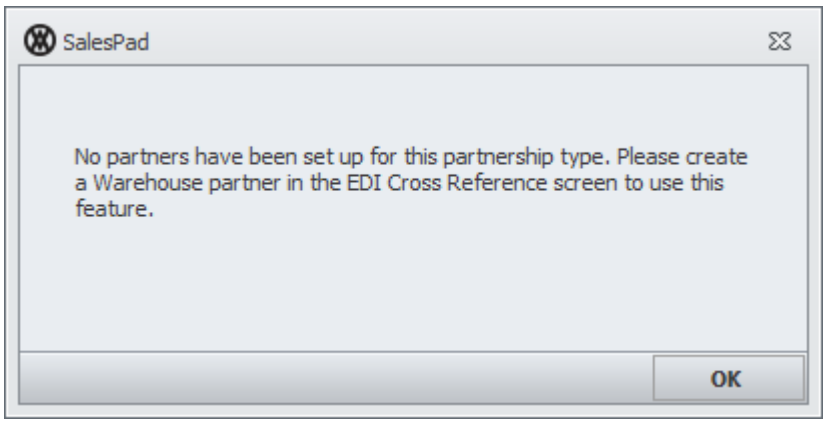


Sales Document EDI 940 By Warehouse

Open the sales document and select the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin from the Actions menu to process an EDI 940 transaction.



A prompt may display that no partners have been set up for the partnership type. If so, open the EDI Data Cross Reference screen and make sure the Warehouse column is set for the trading partner. Save all changes and run the plugin again.

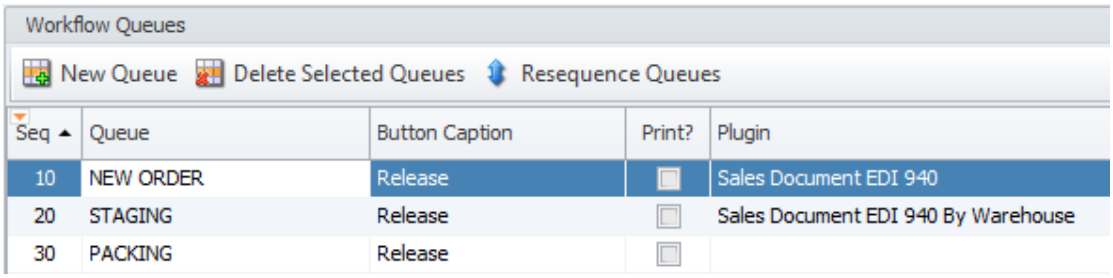


The EDI 940 - Warehouse Shipping Order window will open allowing review of the EDI 940 transaction details before generating and sending the EDI document.

Select the 940 destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

Sales Document Workflow

The EDI 940 - Warehouse Shipping Order and EDI 940 - Warehouse Shipping Order (By Warehouse) plugins can be configured to run automatically in sales document workflow. They should be attached as the Plugin for whichever queue should trigger sending the EDI document. For example, in the below screenshot, the EDI 940 - Warehouse Shipping Order plugin will run when a sales order is forwarded out of the NEW ORDER queue, and the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin will run when a sales order is forwarded out of the STAGING queue.



Note: The EDI 940 - Warehouse Shipping Order window will not be displayed when processing the EDI 940 transaction via workflow, but the transaction will be audited to the sales document audit log.